



January 9
2014

The McQuaig Word Survey®

Lisa Sample
Innovative Sales Solutions

The 
PulseCheck
align • engage • perform



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Lisa Sample

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For additional information or to try the McQuaig Talent Assessment for yourself contact info@thepulsecheck.com.

Understanding

A *The Profile*

This graph provides trained interpreters with a visual picture of her temperament/behaviour pattern - illustrating her natural style of behaviour and noting any changes she may be making to it because of her current situation.

B *Interpretation Report*

Use this report for a comprehensive and fundamental understanding of the potential assets she brings to a job, possible areas for development/concern and an indication of her adjustment to her current situation.

C *Leadership Profile*

A summary of her likely behaviour in a leadership role, use this report if she is currently in or is an applicant for a leadership position in your company or if she may be required to assume leadership responsibilities from time to time (e.g., projects, meetings, special assignments, etc.).

D *Selling Style Report*

A summary of her likely behaviour in a sales role, use this report if she is currently in or is an applicant for a sales role in your company or if, in her current role, she is expected to sell her ideas or solutions, persuade others to her point of view, etc.

Recruiting/Promoting

E *Interviewing Questions – Sales*

Behaviourally based Interviewing Questions, use these questions to probe into her past, on-the-job behaviours to allow you to predict her future on-the-job behaviours.

F *Assessment of Job Fit*

Use this report to evaluate the match between her natural style of behaviour and that of the ideal behaviours required for the position of Sales as described by Account Manager.

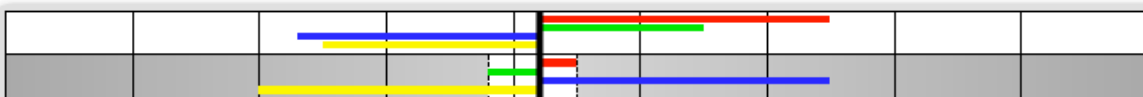


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Managing/Coaching Tips for her Direct Manager

G *Management Overview*

Use this report on a regular basis as a quick reminder of her profile - but be sure to study the other, fuller reports before giving feedback or making any decisions.

H *Motivating Factors*

Use this report to understand her inner needs in order to assess whether they are being met in her current job or if they would realistically be met in a potential new role.

I *Strategies for Coaching and Developing*

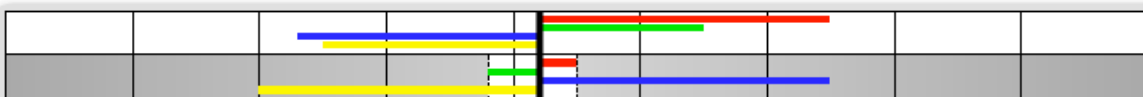
Use this report for guidance on how to work with her effectively. If you have a copy of your own Do's and Don'ts, comparing your expectations to hers will be especially enlightening.

J *Developmental Learning Style Report*

To select the best training approach, use this report if you are training her on a one-to-one basis or are considering formal training courses for her. During her first few weeks on the job, understanding and using this report can make the induction process go much more smoothly.

K *Team Approach*

Use this report to understand how she works in a team. If she is currently on your team and you can compare this report with the Team Approach Reports of other members of your team, this will add considerably to your understanding of your team's current dynamics. If she is an applicant, use this report to see how her style might impact those dynamics.



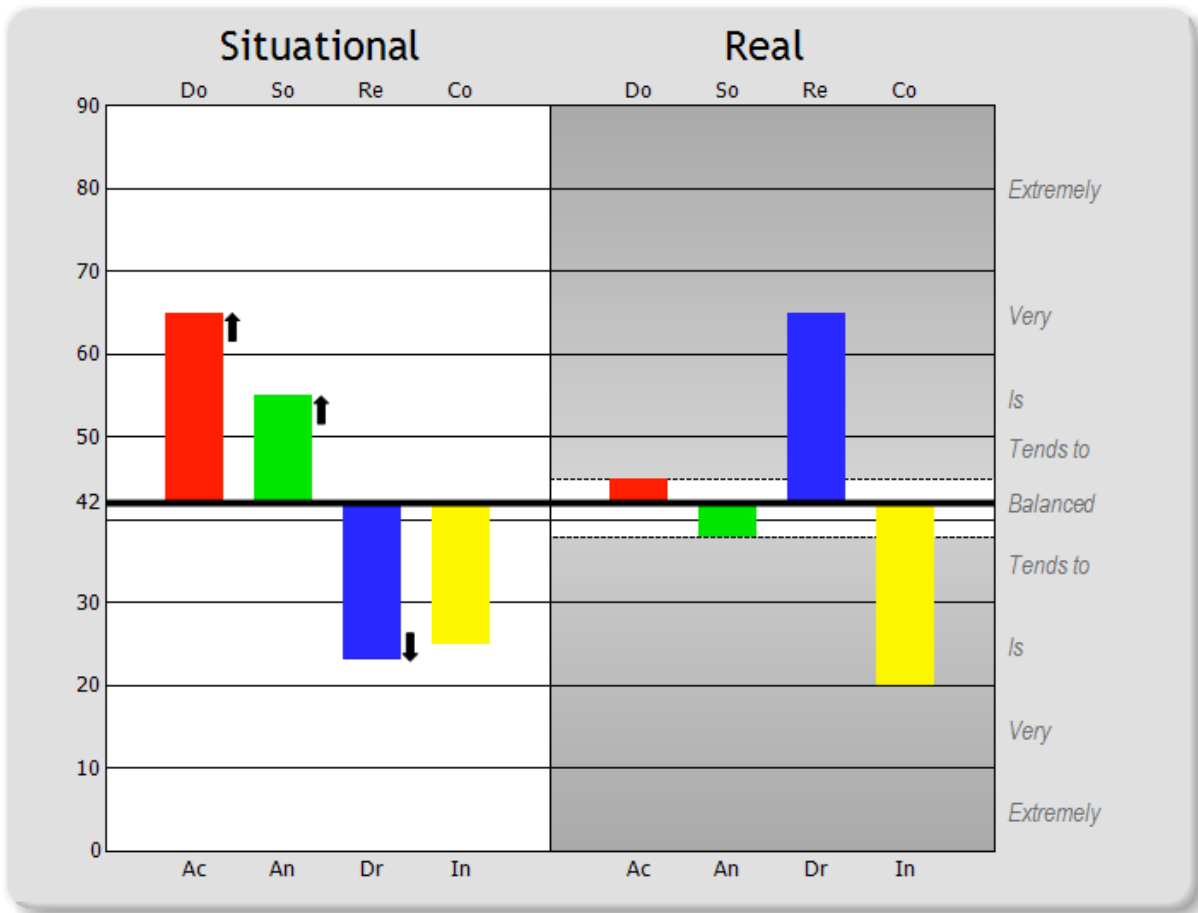
The Profile

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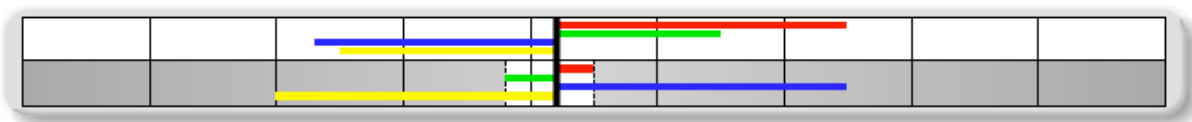
Do 65 So 55 Re 23 Co 25

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Key to Behavioural Scales

- **DO**minant ↔ **AC**cepting: Competitive, Goal Oriented ↔ Deliberate, Cautious
- **SO**ciable ↔ **AN**alytical: Empathetic, Extroverted ↔ Logical, Task Oriented
- **RE**laxed ↔ **DR**iving: Patient, Reliable ↔ Restless, Pressure Oriented
- **CO**mpliant ↔ **IN**dependent: Conscientious, Detail Oriented ↔ Strong Minded, Persistent



Interpretation Report

Lisa Sample

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Developmental Considerations:

Very relaxed and at ease, she prefers to do things according to her own schedule and does not respond to pressure very effectively. She:

- dislikes having her routines interrupted or being rushed to meet deadlines, preferring to have as much time as she needs to do things properly;
- lacks the strong, restless drive to push herself or others to take action without delay.

Very independent, she wants to do things her way and will fight to do so. She:

- is strong willed, wants to think for herself rather than be hampered by rules and regulations, and prefers autonomy;
- does not like detail and will be frustrated if it takes too much of her time, although she may recognize that it's a necessity.

Although she may have an ability to take charge on occasion, she would not respond well to having the authority for others in confrontational situations. She:

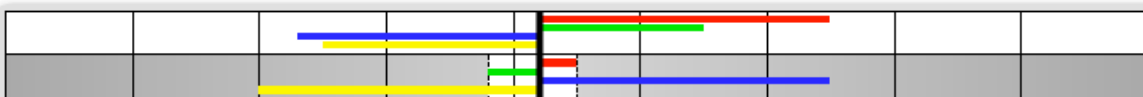
- may not have the strong decisiveness or assertiveness required to resolve difficult problems.

Caution: Such a big difference between what she thinks she is really like and how she feels others see her warrants special consideration. Please investigate further.

Situational Adjustment Indicator:

Because she is stretching quite strongly on the job, the adjustments she is making in her current situation appear to be very significant. Further probing is definitely recommended.

Note: While this assessment of her temperament offers valuable information and focus for your in-depth appraisal, other personal characteristics such as attitudes, self-motivation, stability, emotional maturity, intelligence, etc., as well as skills and abilities, must be probed thoroughly to understand her capabilities fully. This report should be reviewed in combination with The McQuaig Job Survey® results for this position.



Leadership Profile

Lisa Sample

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Introduction

This report offers key information on the natural style of behaviour of Lisa Sample in a leadership role, starting with her potential assets in that role and concluding with possible areas for development. For a fuller understanding of her leadership effectiveness, other personal characteristics such as attitudes, self-motivation, emotional maturity, intelligence, as well as skills and abilities must be considered along with this report.

In working with this report, be sure to use it in combination with the full Interpretation Report and The McQuaig Job Survey® results for the leadership position in question.

Summary

Although lacking a strong sense of urgency, this profile shares the other behavioural characteristics of individuals who adopt a moderate leadership approach. While she can exert her authority if the situation warrants it, she much prefers to compromise to meet the needs of her team.

- Very composed and at ease, she focuses on planning ahead, often providing a calming influence.
- She adopts an unstructured approach to getting things done, delegating the particulars, willing to look outside the box for answers and opportunities, compromising when necessary to avoid alienating her team in the process.
- Although able to balance task orientation with concern for people, she usually adopts a participative leadership approach.

Motivating and Teambuilding

She looks at goal setting as a team effort, focusing on a team “win”. In her own way, she shows great patience and tolerance when working with and coaching others. Focusing on the outcome rather than the process, she maintains a more-or-less hands-off approach, following up to confirm that the finished product fits in with defined objectives. She communicates her ideas in a fairly straightforward, yet pleasant manner.



Leadership Profile

Lisa Sample

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Decision Making and Problem Solving

She prefers to have general agreement and input before making decisions and sees herself as a problem solver who:

- makes sure she is not rushed into making a decision and is careful to avoid hasty reactions to situations
- can offer management inventive solutions that are not overly bound by past precedent
- believes that decisions should evolve from a blend of intuitive thinking and factual analysis

Leading Change

She approaches change cautiously, avoiding a change-for-change-sake mentality. She is hesitant to fix what is not broken, wanting to establish reasonable timeframes before initiating change and setting priorities. She can be innovative in her approach, comfortable with putting a non-traditional spin on things. She will attempt to get buy-in and team involvement.

Developmental Considerations

While the previous sections have provided key information on the potential assets of Lisa Sample in a leadership role, below are detailed potential Developmental Considerations which may be associated with this style. Care should be taken during the interview process to determine if some of these potential concerns are significant and/or whether she has adopted strategies to deal with them.

As mentioned, for a fuller understanding of her leadership effectiveness, other personal characteristics (attitudes, self-motivation, emotional maturity, intelligence, skills, abilities, etc.) must be considered along with this report. These may have a major impact on her ability to maintain her capacity to overcome these Developmental Considerations.

Again, in working with this section of the report, be sure to use it in combination with the full Interpretation Report and The McQuaig Job Survey results for the leadership position in question.

- Her desire to get management buy-in before seizing opportunities or tackling difficult issues may adversely impact results. She can be reluctant to challenge her staff or to assert her authority, possibly accepting low performance standards to avoid confrontation.



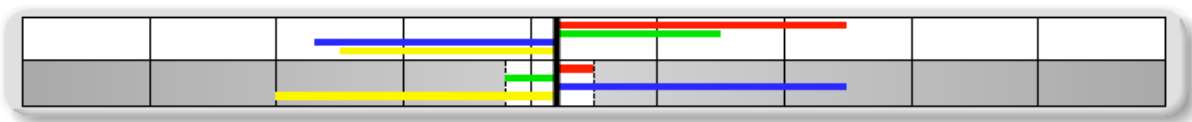
Leadership Profile

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- Her laidback, unhurried manner can hinder her ability to offer quick solutions or decisions. It is unlikely she will be a change agent and, even though she may strongly endorse certain initiatives, it is against her nature to pressure herself or her team to buy-in quickly.
- She is determined to get her own way, but she can lack the high-powered approach needed to bring others on side. Given her natural dislike of administrative concerns, problems can occur during the implementation phase of her initiatives because of a lack of a clear, specific and focused plan of action.
- In her attempt to balance the concerns of her team with the need to meet performance standards, she can send a mixed message, appearing to waver between listening to their opinions and sticking to her own agenda.

Caution: The above is a description of her normal, day-to-day behaviour. However, she is currently stretching very hard on the job. Further probing is recommended to ascertain why she is stretching and whether this will impact her current and/or future leadership potential.



Selling Style

Lisa Sample

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Summary

Although lacking a strong sense of urgency, this profile shares the other characteristics of people who can do well selling to existing clients or inbound callers but who will likely require coaching to develop new business.

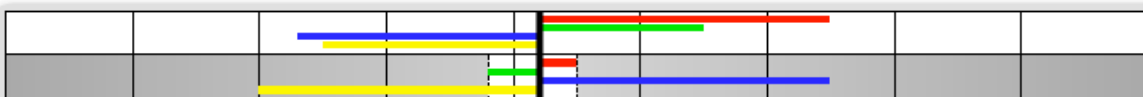
- Very relaxed, she has the patience required for longer sales cycles, though sometimes to the detriment of moving the sale along to a close.
- Very strong minded, she enjoys autonomy and will dislike structured selling roles.
- Recognizing the need to build relationships while presenting information in a factual, straightforward way, she can adapt her communication style to accommodate a range of buyers.

Prospecting

- Not strongly competitive, she will be more effective dealing with existing clients and direct referrals, requiring coaching and support to become an effective prospector for new business.
- Very easy going and lacking the driving energy typically found in good prospectors, she dislikes jumping from one opportunity to the next or applying pressure to close for appointments. She would be best in an environment with very routine, steady paced prospecting activities.
- Very independent, she can be a tenacious and resolute prospector in a receptive territory.
- She will present her business case in a relatively personable manner but she lacks the strong need to influence which is seen in most top prospectors.

Presentation

- She opts for a more interactive, consultative approach in her presentations but she may need coaching to gain control of the meeting and, in particular, to influence her customer to action.
- She presents in a very systematic, practised fashion, an approach that may result in missed opportunities due to her discomfort with deviating from the agenda. Her laid-back presentation style will not appeal to customers with short timeframes.
- She can state her ideas and recommendations firmly, wanting the customer to buy into and accept her point of view. Her big picture approach may be too general for the more detail-oriented customer.



Selling Style

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- She can maintain a balance between presenting the facts and demonstrating a concern for the customer’s emotional issues, but she will struggle if she has to put strong emphasis in her presentation on one or the other.

Closing

- She is more comfortable with customer-initiated closes and will hesitate if she feels she will be challenged when asking for the order.
- Slow to act, she deals more effectively with long-term or repeat order sales but she is unlikely to display or impart much sense of urgency to the close, potentially causing her to miss opportunities to close early.
- Persistent, but in her own good time, she is not afraid to try new approaches if rejected, provided going back in does not cause too much friction between herself and her+ customer. Her occasional lack of attention to detail, though, may result in after-sale problems.
- She can close using logic or emotions.

Caution: The above is a description of her normal, day-to-day behaviours. However, she is currently stretching significantly on the job. Further probing is recommended to ascertain why she is stretching and whether this will impact her current and/or future sales potential.

Note: While this report is based on her temperament and offers key information on her potential for success in sales, other personal characteristics such as attitudes, self-motivation, stability, emotional maturity, intelligence, etc., as well as skills and abilities, must be probed thoroughly to understand her capabilities fully. This report should be viewed in combination with the full Interpretation Report and The McQuaig Job Survey® results for this position.



Interviewing Questions — Sales

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This candidate has described herself as possessing certain behaviours. These questions will help you to assess how she has exhibited these behaviours in the past and whether she has consistently lived up to her full potential. For best possible results, elaborate with open-ended probes which solicit who, what, when, where, why and how responses.

In her answers, you should look for concrete, specific, positive examples of how she has exhibited the behaviours in question and, remember, since many candidates will initially respond with generalities, the deeper you probe, the better.

Most of your interview should centre around how she fits the behavioural requirements determined by the job. If she were to behave in this job the way she has behaved in the past, would this be a good fit?

Always be careful to avoid asking any questions relating to age, sex, marital status, cultural background, religion, etc., in your interview.

Relaxed

She has described herself as being very patient and reliable.

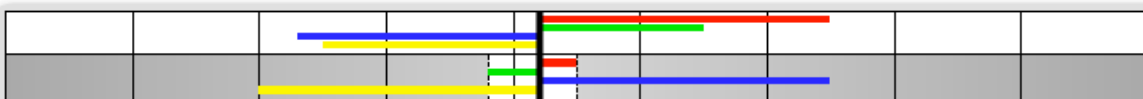
Positive Examples

- Has she remained calm under pressure?
- Has she shown patience when dealing with her customers?
- Has she implemented effective routines?
- Has she developed a steady-as-she-goes sales approach?
- Has she stayed in it for the long haul?

Negative Examples

- Has she been unable to create a sense of urgency in her customers?
- Has she had problems delivering on time?
- Has she had difficulty pushing for the close?
- Has she had trouble adjusting to changes in products, specifications, sales targets?

- Have you ever had a customer who treated everything like a crisis? How did you calm that individual down?
- There is a lot of routine work in sales. Tell me what routines you set up in your last job and how they helped you to produce.
- Some customers want everything yesterday. Can you give me a recent example of how you handled a customer who set unrealistic deadlines?



Interviewing Questions — Sales

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Independent

She has described herself as being very independent and persistent.

Positive Examples

- Has she achieved her targets despite obstacles or customer resistance?
- Has she managed to get her own way without alienating others?
- Has she developed innovative solutions to client concerns?
- Does she have a strong history of closing?

Negative Examples

- Has she been inflexible and stubborn?
- Has she had difficulty offering a compromise solution?
- Has she had after-sale problems due to a lack of follow-through?
- Has her approach been too general for the more detail-oriented customer?
- Has she bent too many rules?

- Did you ever come this close to closing an account only to have a Sales Manager or company policy mess it up? How did you handle it?
- Ever worked for a Sales Manager who was too controlling? Tell me about it.
- Salespeople can sometimes be too strong-willed for our own good. Tell me about a time recently, either with a customer or your team, where a more flexible approach might have been better.
- Paperwork is the bane of every salesperson. Describe a time in your current position where you felt snowed under. How did you handle it?

Sociable/Analytical

She has described herself as having an average amount of sociability and task orientation.

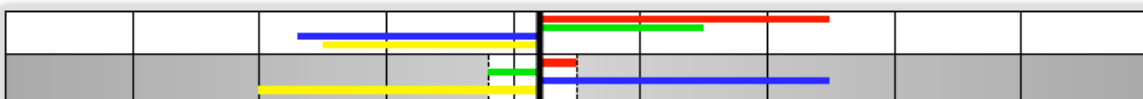
Positive Examples

- Has she established good relations with clients without getting too friendly?
- Has she taken a target-focused approach?
- Has she been able to deliver “bad news” in a diplomatic way?

Negative Examples

- Has she reacted emotionally to sales ups and downs?
- Has she had problems providing good customer service and developing a strong customer following?

- When making sales presentations some salespeople like to paint an exciting picture, while others prefer a more fact-based approach. Which style do you use most often? Can you give me an example?



Interviewing Questions — Sales

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- Some customers can be hostile at first. Tell me about a customer you had to win over.

Dominant/Accepting

She has also described herself as having an average amount of competitiveness and acceptance.

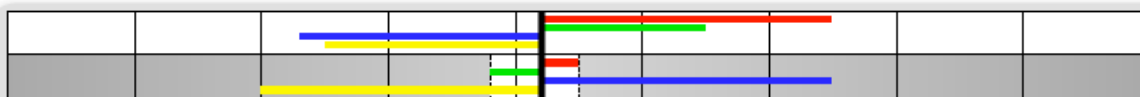
Positive Examples

- Has she been a competitive team player?
- Has she set reasonable targets?
- Has she avoided friction with clients?
- Has she taken a co-operative approach with peers and clients?

Negative Examples

- Has she lost sales by being too focused on her own agenda?
- Has she been perceived as being too “pushy”?
- Has she backed down when facing significant competition?

- Tell me about your targets. How are you doing?
- Can you tell me about a Sales Manager who really inspired you? Why do you say that?



Interviewing Questions — Sales

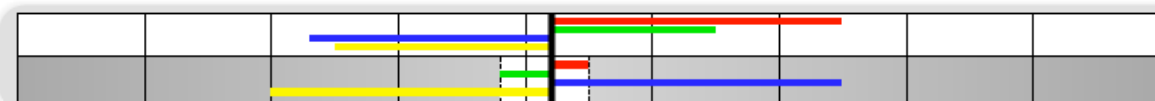
Lisa Sample

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Note: In her current environment, she is making significant changes on the job. These additional questions should help you to determine how this is impacting her job performance.

<i>Positive Examples</i>	<i>Negative Examples</i>
<ul style="list-style-type: none"> ▪ Has she made good decisions? ▪ Has she effectively handled customer problems? ▪ Has she reacted well under stress? ▪ Has she risen to the challenge of conflicting demands? ▪ Has she turned disappointments into successes? 	<ul style="list-style-type: none"> ▪ Has she buckled under pressure? ▪ Does she feel her company, boss, customers want too much from her? ▪ Has she had difficulties meeting her quota? ▪ Does she feel that things are beyond her control?

- Companies expect a lot from their people these days. Tell me about some of the tough, maybe even unrealistic demands you have faced over the past few months.
- Dealing with pressure is a daily event for most of us. Tell me about a high pressure situation you encountered this past year.
- We all want to succeed and, sometimes, push ourselves too hard. Tell me about a situation recently where you felt you pushed yourself to the limit.
- There never seems to be enough time in a day. Describe a recent experience where you felt overwhelmed.
- Some projects really inspire us. Tell me about a project you worked on recently where you were so excited you felt like you could conquer the world.



Interviewing Questions — Sales

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Attention: While the above questions help you, through specific examples from her past history, to understand more fully how she has exhibited her temperament (behaviour pattern) as described by her McQuaig Word Survey®, other personal characteristics such as attitudes, self-motivation, stability, emotional maturity and intelligence must be probed thoroughly to understand her capabilities fully. The following are some suggested interviewing questions to use to probe all or a selection of these important areas.

Attitudes and Beliefs

Positive Examples

- Has she maintained a positive outlook in slow times?
- Does she present her company and its products in a good light?
- Has she set high standards?
- Has she handled problems ethically?
- Does she like selling?

Negative Examples

- Has she had doubts in her own abilities?
- Is she openly critical of customers, operations, etc?
- Has she had difficulty being resourceful when customer problems arose?
- Has she been focused on what went wrong?

- Tell me about a recent assignment or project at work that demonstrated standards you've set for yourself and your work.
- Tell me about a time when you had to stay positive to close a sale.

Self Motivation

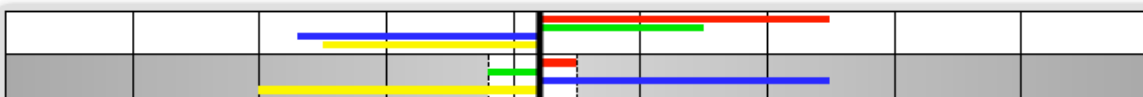
Positive Examples

- Has she pulled herself out of slumps?
- Has she up sold customers?
- Has she tried to beat her sales targets?
- Is she passionate about her company, its products and industry?
- Has she shown initiative in closing sales?

Negative Examples

- Has she done the minimum required?
- Does she believe targets are unreasonable?
- Has she had difficulty prospecting?
- Has she lost interest when she hit a snag?
- Has she depended on a good economy?

- Tell me about a sales situation where you had to push hard to get the order.
- Tell me about a time when you were really excited by a project or sale.



Interviewing Questions — Sales

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Stability and Persistence

Positive Examples

- Has she stuck with it during good times and bad?
- Has she worked successfully with difficult customers?
- Has she viewed rejection as a learning opportunity?
- Has she overcome rejection or resistance?

Negative Examples

- Has she backed away from tough customers?
- Has she gone for the easiest solution?
- Has she had difficulty closing large accounts?
- Has she excuses for not following through?
- Has she given up?

- Would you tell me about a time when you really had to be tenacious to reach your quota?
- Can you tell me about a time when you faced a number of setbacks in your job? How did you handle it?

Maturity and Judgement

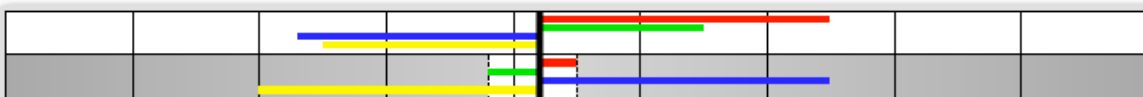
Positive Examples

- Has she used a common sense approach?
- Has she accepted responsibility for her successes and failures?
- Has she been willing to forego short-term commissions for a bigger sale long term?
- Has she shared credit?

Negative Examples

- Has she shown poor judgement?
- Has she lacked self discipline?
- Does she blame the client, the market, the product, the economy — never herself?
- Has she rationalized her failures?
- Has she rejected constructive criticism?

- Can you tell me about a time when you've had to make a sacrifice that had little reward in the short-term?
- Tell me about a time when you received criticism that you felt was unjust. What did you do?



Interviewing Questions — Sales

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Aptitudes/Capacity to Learn

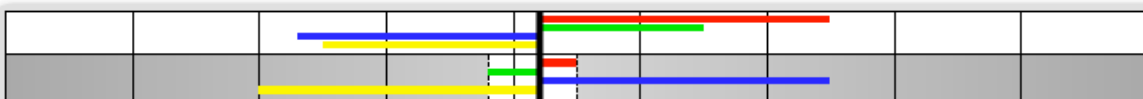
Positive Examples

- Has she demonstrated the ability to explain new products or specs to her clients?
- Has she absorbed information readily?
- Has she been able to solve complex problems for her clients?
- Does she participate in on-going learning?

Negative Examples

- Has she a history of limited progress and achievement?
- Has she done little outside reading?
- Has she been reluctant to advise clients of developments?
- Has she been unable to keep pace with technology?

- When you started your last job, what things came to you naturally and what areas did you really have to apply yourself to understand?
- Can you give me an example of a time you had difficulty grasping a new concept?



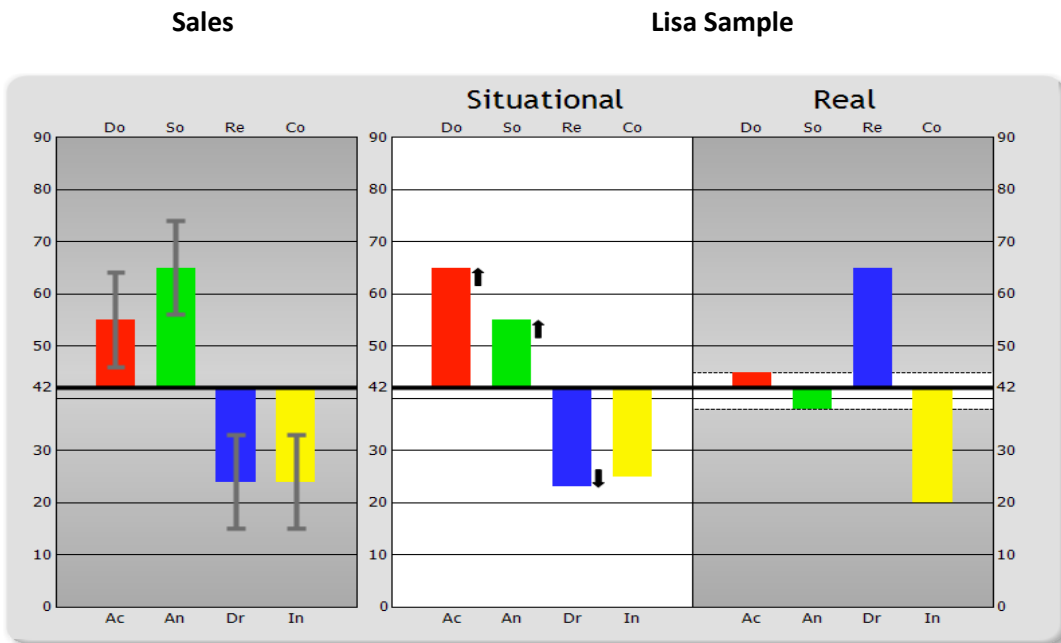
Assessment of Job Fit: Sales

Lisa Sample

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Graphical Summary

This report compares The McQuaig Job Survey® results for the position of Sales (as described by Account Manager on March 9, 2012) to The McQuaig Word Survey® results for Lisa Sample.

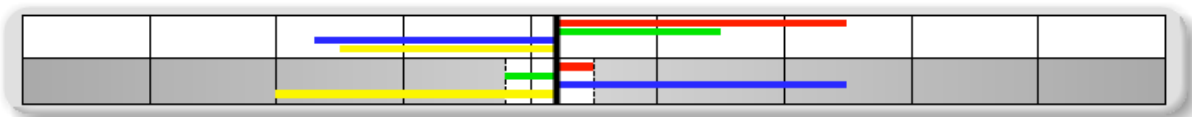


Key to Behavioural Scales

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- **RE**laxed ↔ **DR**iving: Patient, Reliable ↔ Restless, Pressure Oriented
- **CO**mpliant ↔ **IN**dependent: Conscientious, Detail Oriented ↔ Strong Minded, Persistent

Summary of Job Fit: **POTENTIAL MATCH**

The profile and factor scores of Lisa Sample produce a potential behavioural match to The Job Survey. However, other factors such as attitudes, emotional maturity, intelligence, skills and abilities must be probed thoroughly to understand her capabilities fully.



Assessment of Job Fit: Sales

Lisa Sample

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Analysis of Job Fit

Below we compare her real profile to the behavioural job demands.

Compliant ↔ Independent: Strong match

Lisa Sample falls within the desired range on this scale.

Dominant ↔ Accepting: Potential match

Lisa Sample is just outside of the desired range on this scale.

Sociable ↔ Analytical: Does not match

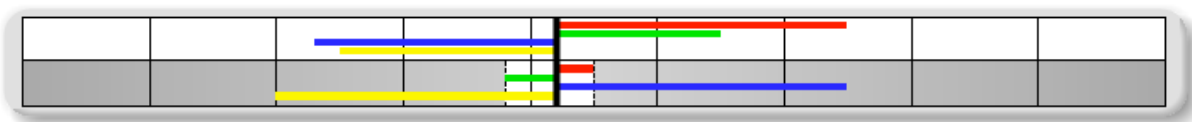
Lisa Sample is well outside of the desired range on this scale.

Relaxed ↔ Driving: Does not match

Lisa Sample is well outside of the desired range on this scale.

Overview

<i>Job: Sales</i> Success in this position requires someone who is...	<i>Candidate: Lisa Sample</i> Lisa Sample is...
<ul style="list-style-type: none"> Very friendly, sociable and out-going, much more interested in people than in ideas and methods Restless and energetic, impatient with the status quo Independent, persistent and dislikes being supervised Competitive and goal oriented, preferring challenge 	<ul style="list-style-type: none"> Able to maintain a balance between being sociable and analytical Very relaxed, patient and easy going, with a desire to avoid pressure and deadlines Very independent, persistent and decisive, very uncomfortable being supervised Able to maintain a balance between being competitive yet accommodating



Assessment of Job Fit: Sales

Lisa Sample

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In her current role, Lisa Sample is making some significant adjustments that may impact her day-to-day behaviours. These should be taken into account when making an overall assessment of the match.

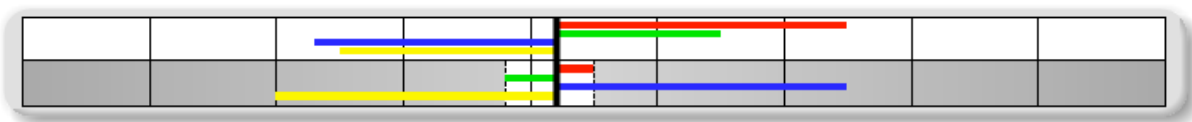
Strengths Analysis

Lisa Sample has scored within the desired range on the *Compliant↔Independent* Scale.

The following questions will help you determine whether Lisa Sample uses her independence in a productive way. Positive and negative examples of the trait have been provided to help interpret the responses. Probe to ensure that you get specific, detailed responses.

<p><i>Independent</i> This job calls for a salesperson who is independent.</p>	
<p><i>Positive Examples</i></p> <ul style="list-style-type: none"> ▪ has achieved targets despite strong obstacles ▪ has managed to get his/her own way without alienating others ▪ has come up with innovative solutions to client concerns ▪ has shown self-discipline ▪ has a history of closing. 	<p><i>VS. Too Independent</i></p> <ul style="list-style-type: none"> ▪ has been too opinionated, inflexible and forceful ▪ has had follow-through issues.
	<p><i>Or Not Independent Enough</i></p> <ul style="list-style-type: none"> ▪ has gone along too easily ▪ has been distracted, focusing too much on detail.

- Tell me about the toughest client decision you had to make in the last year.
- Tell me about a Sales Manager you worked for who was too restrictive.



Assessment of Job Fit: Sales

Lisa Sample

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Gap Analysis

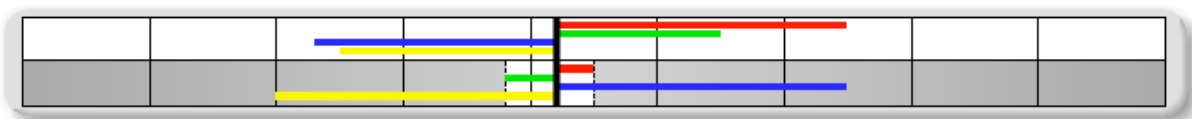
Lisa Sample has scored just outside the desired range on the *Dominant↔Accepting* Scale.

The Job Survey calls for someone who is more competitive than she is. To determine how this will impact job performance ask the questions below.

Explore her past looking for examples where she needed to behave more competitively and how it affected her performance. Positive and negative examples of the trait have been provided below. Probe to ensure that you get specific, detailed responses.

<p><i>Dominant</i> This job calls for a salesperson who is dominant and competitive.</p>	
<p><i>Positive Examples</i></p> <ul style="list-style-type: none"> ▪ has shown a desire to compete and achieve better results than others ▪ has set ambitious, challenging targets ▪ has solved problems ▪ has taken calculated risks to achieve ▪ has worked effectively and persuasively with customers and co-workers. 	<p><i>VS. Too Dominant</i></p> <ul style="list-style-type: none"> ▪ has not been a team player ▪ has been too aggressive ▪ has had a “win at all costs” attitude.
	<p><i>Or Not Dominant Enough</i></p> <ul style="list-style-type: none"> ▪ has been unassertive with customers ▪ has avoided risks ▪ has given up.

- Can you think of a time when you were given an unrealistic quota? Tell me about it.
- Sometimes it takes more to sell a deal back at the office than it does to sell the customer. Tell me about your experience in this area.
- Tell me about your most demanding customer.



Assessment of Job Fit: Sales

Lisa Sample

Innovative Sales Solutions

Gap Analysis

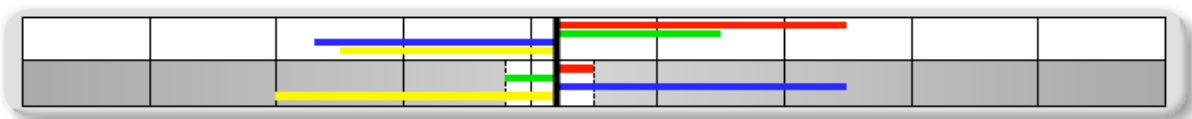
Lisa Sample has scored well outside the desired range on the *Sociable*↔*Analytical* Scale.

The Job Survey calls for someone who is much more sociable than she is. To determine how this will impact job performance ask the questions below.

Explore her past looking for examples where she needed to behave much more sociably and how it affected her performance. Positive and negative examples of the trait have been provided below. Probe to ensure that you get specific, detailed responses.

<p><i>Sociable</i> This job calls for a salesperson with a high level of sociability.</p>	
<p><i>Positive Examples</i></p> <ul style="list-style-type: none"> ▪ has proven an effective networker ▪ has used interpersonal skills to develop relationships ▪ has handled client problems tactfully ▪ has been involved without losing perspective ▪ has inspired strong customer loyalty. 	<p><i>VS. Too Sociable</i></p> <ul style="list-style-type: none"> ▪ has confused client visits with sales ▪ has been a customer advocate at the expense of sales.
	<p><i>Or Not Sociable Enough</i></p> <ul style="list-style-type: none"> ▪ has not developed good customer relations ▪ has expected the product to sell itself.

- Tell me about a time you needed to pull key decision-makers together for a presentation.
- Tell me about how you go about developing business contacts.
- Some customers are more difficult to sell to than others. Tell me about a customer who required extra effort.



Assessment of Job Fit: Sales

Lisa Sample

Innovative Sales Solutions

Gap Analysis

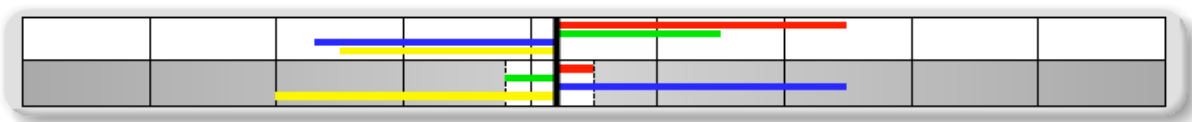
Lisa Sample has scored well outside the desired range on the *Relaxed↔Driving* Scale.

The Job Survey calls for someone who is much more driving than she is. To determine how this will impact job performance ask the questions below.

Explore her past looking for examples where she needed to behave with much more drive and how it affected her performance. Positive and negative examples of the trait have been provided below. Probe to ensure that you get specific, detailed responses.

<p><i>Driving</i> This job calls for a salesperson who is driving.</p>	
<p><i>Positive Examples</i></p> <ul style="list-style-type: none"> has displayed a driving sense of urgency that excites the customer to action has a history of acting quickly has consistently recognized the need for fast action has responded well to pressure and adapted well to change. 	<p><i>VS. Too Driving</i></p> <ul style="list-style-type: none"> has abandoned long-term sales prospects for new ones has applied too much pressure. <hr/> <p><i>Or Not Driving Enough</i></p> <ul style="list-style-type: none"> has not recognized priorities has been slow to respond to customer requests.

- Can you give me an example of when you really had to apply pressure to make a sale?
- Tell about a time when you had to make a trade-off to meet a tight deadline.



Management Overview

Lisa Sample

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Summary: Although lacking a strong sense of urgency or a specifically people-oriented approach, this profile is representative of many managers and supervisors as well as of people who are in production or new business development roles. Be sure to note the “on the job” comment below.

Potential Assets:	Developmental Considerations:
Very patient and steady, she likes routine, has her own time frames and does not have to make constant changes. Very persistent and self-reliant, she is independent and determined to get her way. She has an average amount of sociability and task orientation, competitiveness and acceptance.	She does not respond to pressure and lacks the strong, restless drive to take action quickly. She will fight to do things her way and she will be frustrated with too much detail work. Depending upon the job function, more competitiveness may be an asset.

On the Job: In stretching so significantly right now, she may be feeling over-challenged – how long can she maintain this behaviour?

Motivating strategies:

Take the time to explain things properly and let her set her own pace. Keep things around her calm and don't keep interrupting her routines. Give her time to prepare. Recognize she has strong convictions and let her do things her way when appropriate. Let her know she is in control. Don't hesitate to step in to get her back on track if necessary. Use her insights about people but don't expect her to react enthusiastically to things immediately. Provide her with support when she needs it but don't expect her to handle unlimited responsibility.

Note: Different strategies may apply right now due to her situational behaviour.

Coaching Guidelines:

- Supply a relaxed environment, having enough time to cover topics properly, initiating changes carefully.
- Let her try things for herself but explain the importance of rules and procedures, asking for her opinion and listening to it.
- Allow for some interaction with others as well as concentration time.
- Give her an overview initially, then make sure you fill in the blanks.

Note: Her situational behaviour may impact her receptivity to training at this time.



Motivating Factors

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The following descriptions relate to characteristics at their most extreme and may require some modification. If the marker falls in the balanced area, then expect this individual to display a flexible balance between the characteristics described in the right and left paragraphs. But, the further the marker is to the right or left, the more the description in the paragraph directly below the marker will apply.

Ego



People who are strong in this area are team players who want their team to work together in harmony and will support their team's efforts on projects that provide little personal gain. They seek out positions that provide them with security, good leadership and sound fiscal management. Disliking risky situations, they proceed carefully and prudently, deliberating cautiously before making decisions. Their motto could be, "Let's be careful out there."

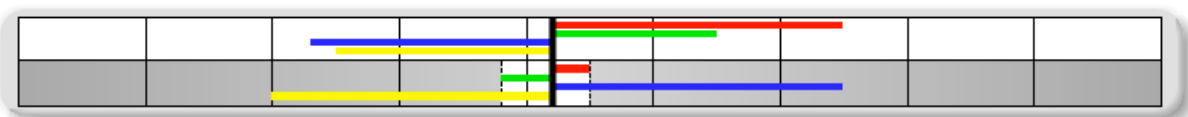
People who are strong in this area are focused on winning. They are drawn to positions where they have the authority to act and get to call the shots without interference. They want to be in control and dislike taking a back seat to anyone for very long. They expect to be recognized and accept rewards for their work as their right. Spurred on by a strong desire for personal gain and success, their motto could be, "What's in it for me?"

Status



People who are strong in this area take pride in their ability to think rationally, seeking out situations where the ability to analyze objectively and stick to the point are respected attributes. They keep their office and home life separate, disapprove of office politics, are relatively indifferent to the trappings of success and are uncomfortable with people who expect to be instant friends. Their motto could be, "Let's be logical."

People who are strong in this area are open and friendly. They want to be popular and bask in the affection that comes from being likeable. They need to belong and be where there is genuine warmth and emotional commitment. They enjoy the outward signs of success (nice office, plaques on the walls), do not want to be left out and find it hard to identify with people who prefer to keep to themselves. Their motto could be, "Let's talk."



Motivating Factors

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Timelines



People who are strong in this area thrive on putting out fires – emergencies are exciting, change is good. They rush through life at utmost speed, enjoying any opportunity to shake up the status quo and stir things up. They are excited by plenty of activity, lots of priority juggling. They get bored quickly, lose interest once something becomes routine and believe everyone should share their sense of urgency. Their motto could be, “Let’s do it now.”

People who are strong in this area are easy-going and unflappable. They believe in taking the time to smell the roses. They flourish in stable, family-like surroundings, working with colleagues who share their methodical approach to time management. They appreciate established routines that are not constantly or needlessly changed and become uncomfortable when they feel pressured to meet unreasonable deadlines. Their motto could be, “Haste makes waste.”

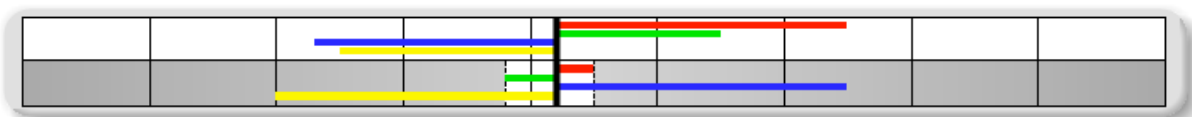
Structure



People who are strong in this area believe in their opinions and are not afraid to express them or stick to their guns when opposed. They want the freedom to act independently and the authority to make their own decisions in an environment that listens to and, most often, adopts their point of view. They dislike being told what to do, resist authority and think rules are made to be, if not broken, at least bent. Their motto might be, “I know what to do.”

People who are strong in this area are systems oriented. They look for proper controls, work within established guidelines, attentive to the fine points. They seek out concrete solutions, wrestling with gray areas until clearly defined. Good planners, they can be relied on to implement detailed procedures. They dislike imprecise instructions, unfocused leadership or lack of structure. Their motto might be, “If it’s worth doing, it’s worth doing right.”

Note: The above are highlights only - for a better understanding, see the full Interpretation Report or contact your McQuaig interpreter, especially in view of her current situational behaviour.



Strategies for Coaching and Developing

Lisa Sample

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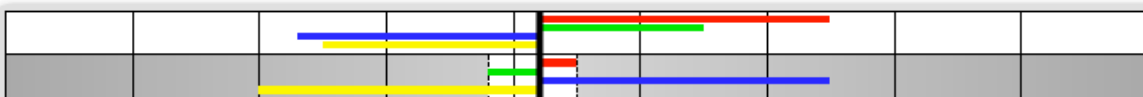
Note: These Do's and Don'ts are based on an assessment of her temperament only. Other factors such as level of intelligence, emotional maturity, attitudes and others may influence the relevance of some of these points.

Do

- confirm timelines when assigning a task
- minimize last minute changes and provide flexible timeframes
- encourage her to set up her own processes and project plans
- if it's an emergency, make sure you've communicated the urgency
- provide advance warning of up-coming priorities whenever possible
- be prepared to take the time to explain things to her satisfaction
- foster an environment where she can display initiative and work independently
- welcome her opinions and her willingness to take a stand
- provide opportunities for her to make decisions
- acknowledge her contributions when you act on one of her suggestions
- coach her to adopt a team perspective
- resolve differences of opinions together
- probe into her insights about others; she likes people, and she is also likely to be objective about them
- acknowledge her value to the team
- provide her with a balance between interacting with other people and using her analytical skills
- encourage her to set her own goals
- include her as an integral part of your team
- request her opinions on how a project/task should be handled

Don't

- put pressure on her unnecessarily – she works best in a predictable environment
- leave everything to the last minute – respect her need to schedule tasks in advance
- give her too many things at once – she prefers to handle projects sequentially
- change things without good rationale – she can resist change, especially if she does not understand the reasons behind it



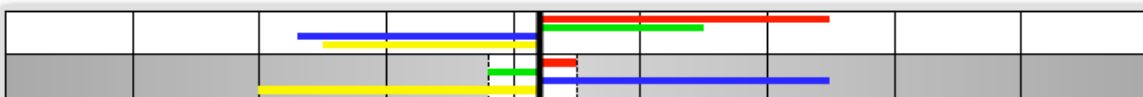
Strategies for Coaching and Developing

Lisa Sample

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- be too structured in how you want things done – she prefers to determine the course of action herself
- insist on your own approach all the time – she will feel micromanaged
- let her push the envelope too far – she needs to know when she has overstepped bounds
- hesitate to stand up to her when necessary – she can need reminding that there are good reasons why her way is not always the best
- expect an enthusiastic response to all your suggestions – she prefers to review the facts and figures first
- prevent her from striking a balance between having people contact and staying focused on the task at hand – she likes a combination of both
- delegate control of a difficult group to her – her team-oriented approach may be less effective with strong personalities
- put her in highly competitive situations – while she may enjoy the occasional competition, she prefers solving problems together

Caution: Something on the job right now appears to be causing her to stretch outside her comfort zone. Is it possible that her current job is demanding that she behave more assertively?



Developmental Learning Style

Lisa Sample

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Note: This report on her behavioural Learning Style is based on an assessment of her temperament exclusively. It may be advisable to add or delete some statements depending upon her level of intelligence, knowledge, emotional maturity, attitudes and other factors in her present record and past circumstances.

This individual relates well to training situations that give her an opportunity to try things more than once so that she can become comfortable with the routine and have enough time to assimilate what is being taught before moving on. If topics are covered too quickly, she may have difficulty keeping up; therefore, pressure and deadlines are better kept to a minimum. She prefers to see things moving at a steady, consistent pace and does not need nor want lots of excitement.

Experimenting, thinking for herself, doing things her own way, these things come naturally to this strong-minded, determined person. She has her own opinions and will express them freely. She much prefers training that focuses more on the overall concept than on the details or the process, but she can stay on track if the rationale for their existence makes sense. Overall, though, she learns best in programs that offer her the opportunity to fill in the blanks for herself.

She can relate to training that offers a good blend of interactive group activities and lectures. Sessions that stress the positive while dealing realistically with the negative will have more impact on her than those that emphasize one over the other. She enjoys entertaining training programs that provide relevant content.

She prefers training that provides her with an opportunity to stand out - if she is comfortable doing so. She can focus on the overall picture, but not at the expense of the specifics. She looks for training programs to give her just the right balance of information - enough to be able to assimilate comfortably without being overwhelmed by minutia.

Note: Her attempted behaviour may impact her receptivity to training at this time.



Team Approach

Lisa Sample

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Synopsis: Overall, she would be most effective in a limited frontline role in which she could assume responsibility and control for at least part of the group's direction and/or for special projects.

Attributes

- Because her naturally patient, easy-going manner helps her to maintain her composure, even when others are losing theirs, she can be a steadying influence in a group, diffusing unnecessary time pressures.
- Her determined, sometimes unorthodox approach to problems and solutions should inspire her fellow team members to adopt a broader based thinking process.
- While inclined to enjoy the interaction within a group to some extent, she also appreciates being able to solo on her own projects.
- Although comfortable working in a team environment in a technical role, she may be capable of assuming the reins, especially when dealing with complex problems which would capitalize on her specialized knowledge.

Developmental Areas

- Her deliberate, slow pace may cause frustrations among the faster movers on the team.
- Her strong willed, even dogmatic style can be counterproductive, causing resentment in the group because of her perceived obstinacy.
- Her focus on bottom line issues may triumph over her concern for their impact on people.
- She prefers to see a correlation between her goals and the team's, but she will not impose her aims on others and may defer to the majority.

Managing Guidelines

She is inclined to want some freedom, so give her responsibility for at least part of the project. However, don't expect her to want unlimited authority over a large group and do expect occasional people problems. Capitalize on her production-oriented leadership tendencies.

Attention: She appears to be stretching herself significantly right now and this attempt to come across much stronger than she really is will quite likely impact on how she interacts in a team.



Team Approach

Lisa Sample

Innovative Sales Solutions

Note: A study of this individual's behaviour style is not sufficient to ensure team fit. Other characteristics such as attitude, motivation, maturity, experience and past history need to be assessed in order to make an informed decision. To get the fullest understanding of this individual's behaviour in a team situation, review this report with a trained and experienced McQuaig Interpreter.

